



CITY OF LODI COUNCIL COMMUNICATION

AGENDA TITLE: Adopt Resolution Initiating Proceedings for the Levy and Collection of Assessments, Resolution Approving the Annual Report, and Resolution Declaring Intention to Levy and Collect Assessments for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for Fiscal Year 2012/13; Set Public Hearing for June 20, 2012

MEETING DATE: May 16, 2012

PREPARED BY: Public Works Director

RECOMMENDED ACTION: Adopt the following resolutions and set a public hearing for June 20, 2012:

1. Initiating proceedings for the levy and collection of assessments for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for Fiscal Year 2012/13
2. Approving the Annual Report for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for Fiscal Year 2012/13
3. Declaring its intention to levy and collect assessments for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for Fiscal Year 2012/13

BACKGROUND INFORMATION: Over the past nine years, the City Council has formed a total of 16 zones of the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 (District). The scope of maintenance activities funded by the District includes 1) landscape and irrigation, 2) masonry block walls, 3) street parkway trees, and 4) public park areas. The activities and levy amounts vary by zone, as described in the City of Lodi, Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1, Annual Report (Report), Fiscal Year 2012/13 that is on file in the Public Works Department.

The Report includes a diagram of the District showing the area and properties proposed to be assessed; an assessment of the estimated costs of maintenance, operations and servicing of improvements; and the net levy upon all assessable lots and/or parcels within the District. Although each district varies in cost, the overall cost decreased 2 percent from last year.

The action requested of the City Council is to initiate proceedings for the levy and collection of assessments for Fiscal Year 2012/13, approve the Annual Report, to declare its intention to levy the assessments and to set a public hearing for June 20, 2012, to receive public comments. After the public hearing, City Council will be asked to confirm the Final Report and order the levy and collection of the assessments.

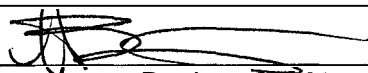
FISCAL IMPACT: Funding for preparation of the Report is included in the assessments.

FUNDING AVAILABLE: Not applicable.

for 
F. Wally Sandelin
Public Works Director

Prepared by Chris Boyer, Assistant Engineer
Attachment
cc: Interim Parks, Recreation and Cultural Services Director
NBS
Deputy Public Works Director – Utilities

APPROVED:


Konrad Bartlam, City Manager



City of Lodi

Consolidated Landscape Maintenance District No. 2003-1

Fiscal Year 2012/13 Engineer's Report

June 2012

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1. ENGINEER'S LETTER

WHEREAS, on May 16, 2012, the *City Council* ("Council") of the *City of Lodi* ("City"), pursuant to the *Landscaping and Lighting Act of 1972* ("Act"), adopted a resolution initiating proceedings for the levy and collection of assessments for the *Lodi Consolidated Landscape Maintenance District No. 2003-1* ("District"), Fiscal Year 2012/13;

WHEREAS, said resolution ordered NBS Government Finance Group, DBA NBS, to prepare and file a report, in accordance with §22567 of the Act, concerning the assessment of the estimated costs of operating, maintaining and servicing the improvements within the District for the fiscal year commencing July 1, 2012 and ending June 30, 2013.

NOW THEREFORE, the following assessments are made to finance the operation, maintenance, and servicing of the improvements within the District:

DESCRIPTION	AMOUNT
Zone 1 - Total Assessment	\$17,588.32
Dwelling Unit Equivalents	74
Assessment per Dwelling Unit Equivalent	\$237.68
Zone 2 - Total Assessment	\$27,060.18
Dwelling Unit Equivalents	133
Assessment per Dwelling Unit Equivalent	\$203.46
Zone 3 - Total Assessment	\$6,968.52
Dwelling Unit Equivalents	39
Assessment per Dwelling Unit Equivalent	\$178.68
Zone 4 - Total Assessment	\$6,743.00
Dwelling Unit Equivalents	34
Assessment per Dwelling Unit Equivalent	\$198.33
Zone 5 - Total Assessment	\$46,334.94
Dwelling Unit Equivalents	223
Assessment per Dwelling Unit Equivalent	\$207.78
Zone 6 - Total Assessment	\$19,563.20
Dwelling Unit Equivalents	80
Assessment per Dwelling Unit Equivalent	\$244.54
Zone 7 - Total Assessment	\$671.00
Dwelling Unit Equivalents	5
Assessment per Dwelling Unit Equivalent	\$134.20
Zone 8 - Total Assessment	\$6,336.58
Dwelling Unit Equivalents	17
Assessment per Dwelling Unit Equivalent	\$372.74

(Continued on next page)

DESCRIPTION	AMOUNT
Zone 9 - Total Assessment	\$2,008.82
Dwelling Unit Equivalents	11
Assessment per Dwelling Unit Equivalent	\$182.62
Zone 10 - Total Assessment	\$906.36
Dwelling Unit Equivalents	7
Assessment per Dwelling Unit Equivalent	\$129.48
Zone 11 - Total Assessment	\$1,445.36
Dwelling Unit Equivalents	7
Assessment per Dwelling Unit Equivalent	\$206.48
Zone 12 - Total Assessment	\$1,567.84
Dwelling Unit Equivalents	8
Assessment per Dwelling Unit Equivalent	\$195.98
Zone 13 - Total Assessment	\$720.60
Dwelling Unit Equivalents	93.104
Assessment per Dwelling Unit Equivalent	\$7.74
Zone 14 - Total Assessment	\$420.24
Dwelling Unit Equivalents	17
Assessment per Dwelling Unit Equivalent	\$24.72
Zone 15 - Total Assessment	\$579.18
Dwelling Unit Equivalents	36.268
Assessment per Dwelling Unit Equivalent	\$15.97
Zone 16 - Total Assessment	\$105.96
Dwelling Unit Equivalents	8.370
Assessment per Dwelling Unit Equivalent	\$12.66

I, the undersigned, respectfully submit this report and, to the best of my knowledge, information and belief, the assessments and assessment diagrams herein have been computed and prepared in accordance with the order of the Council.

F. Wally Sandelin, P.E., Engineer of Work

Date

Seal

2. OVERVIEW

This report describes the District and details the assessments to be levied against the parcels therein for Fiscal Year 2012/13. Such assessments account for all estimated direct & incidental expenses, deficits/surpluses, revenues, and reserves associated with the operation, servicing and maintenance of the improvements.

The word “parcel,” for the purposes of this report, refers to an individual property that has been assigned an Assessor’s Parcel Number by the San Joaquin County Assessor. The San Joaquin County Auditor-Controller uses Assessor’s Parcel Numbers and specific Tax Codes to identify the parcels assessed on the County Tax Roll within special benefit districts.

2.1 District Formation and Annexation History

The District is currently comprised of 16 distinct zones within the City. New zones may be annexed into the District if approved via property owner balloting proceedings.

ZONES 1 AND 2

A report was prepared in 2003 for Zones 1 and 2. Property owner balloting proceedings were conducted, effective for the Fiscal Year 2004/05 assessment. After attaining property owner approval, the City began levying and collecting these assessments on the County Tax Roll in order to provide continuous funding for the related improvements.

ZONES 3 THROUGH 7

In 2004, separate reports were prepared for Zones 3, 4, 5 & 6, and 7. Property owner balloting proceedings were conducted within Zones 3 and 4 for the Fiscal Year 2004/05 assessment and within Zones 5 through 7 for the Fiscal Year 2005/06 assessment. After attaining property owner approval, the City began levying and collecting these assessments on the County Tax Roll in order to provide continuous funding for the related improvements.

ZONES 8 THROUGH 12

A separate report was prepared in 2005 for Zones 8 through 12. Property owner balloting proceedings were conducted for the Fiscal Year 2005/06 assessment. After attaining property owner approval, the City began levying and collecting these assessments on the County Tax Roll in order to provide continuous funding for the related improvements.

ZONE 13

A separate engineer’s report was prepared in 2007 for Zone 13. Property owner balloting proceedings were conducted for the Fiscal Year 2007/08 assessment. After attaining property owner approval, the City began levying and collecting these assessments on the County Tax Roll in order to provide continuous funding for the related improvements.

ZONES 14 THROUGH 16

A separate engineer’s report was prepared in 2008 for Zones 14 through 16. Property owner balloting proceedings were conducted for the Fiscal Year 2008/09 assessment. Property owner approval was attained; the City will begin levying and collecting these assessments on the County Tax Roll in order to provide continuous funding for the related improvements.

2.2 *Effect of Proposition 218*

On November 5, 1996, California voters approved Proposition 218 (Government Code commencing with Section 53739) by a margin of 56.5% to 43.5%. The provisions of the Proposition, now a part of the California Constitution, add substantive and procedural requirements to assessments, which affect the City of Lodi landscape maintenance assessments.

The Act, Article XIID of the Constitution of the State of California and the Proposition 218 Omnibus Implementation Act are referred to collectively as the “Assessment Law”.

3. PLANS AND SPECIFICATIONS

ZONE 1 – ALMONDWOOD ESTATES

Zone 1 is comprised of the Almondwood Estates subdivision; the facilities within Zone 1 that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping area along the east side of Stockton Street from the project's north boundary to Almond Drive, including the angled corner section at Elgin Avenue, approximately 1220 linear feet.
- B. A masonry wall and 13.5' wide landscaping area along the north side of Almond Drive from the project's east boundary westerly to Stockton Street, including the angled corner sections at Blackbird Place and Stockton Street, approximately 340 linear feet.
- C. Street parkway trees located within the public street within the Zone 1 boundary.
- D. Public park land area of 0.5661 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 1 consists of a 74-lot low density residential development located in the southeastern portion of the City.

Zone 1 includes 74 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 1 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by the Zone 1 shall be filed with the City and will be incorporated into this report by reference.

ZONE 2 – CENTURY MEADOWS ONE, UNITS 2 & 3

Zone 2 is comprised of Century Meadows One, Units 2 & 3 the facilities within Zone 2 that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping area along the north side of Harney Lane from the project's east boundary to the west boundary, including the 2 angled corner sections at Poppy Drive, approximately 1200 linear feet.
- B. Street parkway trees located within the public street within the Zone 2 boundary.
- C. Public park land area of 1.01745 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 2 consists of a 133-lot low density residential development located in the south-central portion of the City.

Zone 2 includes 133 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 2 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 2 shall be filed with the City and will be incorporated into this report by reference.

ZONE 3 – MILLSBRIDGE II

Zone 3 is comprised of Millsbridge II; the facilities within Zone 3 that will be operated, serviced and maintained are generally described as follows:

- A. Street parkway trees located within the public street within the Zone 3 boundary.
- B. Public park land area of 0.30 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per one thousand persons served.

Zone 3 consists of a 39-lot residential development located in the southwestern portion of the City.

Zone 3 includes 39 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for the Zone 3 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 3 shall be filed with the City and will be incorporated into this report by reference.

ZONE 4 – ALMOND NORTH

Zone 4 is comprised of the Almond North subdivision; the facilities within Zone 4 that will be operated, serviced and maintained are generally described as follows:

- A. Street parkway trees located within the public street within the Zone 4 boundary.
- B. Public park land area of 0.26 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per one thousand persons served.

Zone 4 consists of a 28-lot residential development, including 6 potential duplex lots and is located in the southeastern portion of the City.

Zone 4 includes a maximum of 34 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 4 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 4 shall be filed with the City and will be incorporated into this report by reference.

ZONE 5 – LEGACY ESTATES I & II AND KIRST ESTATES

Zone 5 is comprised of Legacy Estates I, Legacy Estates II and Kirst Estates; the facilities within Legacy Estates I of Zone 5 that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping strip, divided by a 4-foot wide meandering sidewalk, along the north side of Harney Lane at the back of lots 10-24 of Legacy Estates I, approximately 950 linear feet.
- B. Street parkway trees located within the public street within the Zone 5 boundary.
- C. Public park land area of 0.589 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

The improvements within Legacy Estates II of Zone 5 that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping strip, divided by a 4-foot wide meandering sidewalk, along the west side of Mills Avenue from the project's southern boundary on Mills Avenue to the intersection of Wyndham Way, approximately 590 linear feet.
- B. A masonry wall and 13.5' wide landscaping strip, divided by a 4-foot wide meandering sidewalk, along the north side of Harney Lane at the back of lots 69-77 of Legacy Estates II, approximately 525 linear feet.
- C. Street parkway trees located within the public street within the Zone 5 boundary.
- D. Public park land area of 1.07 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

The facilities within Kirst Estates of Zone 5 that will be operated, serviced and maintained are generally described as follows:

- A. Street parkway trees located within the public street within the Zone 5 boundary.
- B. Public park land area of 0.0459 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 5 consists of a 77-lot residential development (Legacy Estates I), a 140-lot residential development (Legacy Estates II) and a 6-lot residential development (Kirst Estates) located in the southwestern portion of the City. Each lot benefits equally from the facilities within Zone 5.

Zone 5 includes 223 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 5 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 5 shall be filed with the City and will be incorporated into this report by reference.

ZONE 6 – THE VILLAS

Zone 6 is comprised of The Villas subdivision; the facilities within Zone 6 that will be operated serviced and maintained are generally described as follows:

- A. A masonry wall and 8.5' wide landscaping area along the east side of Panzani Way from the project's south boundary to the intersection of Porta Rosa Drive, approximately 120 linear feet.
- B. A masonry wall and 27.5 to 43.0-foot variable width landscaping strip, divided by a 4-foot wide meandering sidewalk, along the north side of Harney Lane from Panzani Way to the frontage road, approximately 425 linear feet.
- C. A masonry wall and 15.0 to 44.0-foot variable width landscaping strip, divided by a 4-foot wide meandering sidewalk, along the west of the frontage road and the east side of San Martino Way from Harney Lane to the project's north boundary, approximately 700 linear feet.
- D. Ten 24-foot wide, common access driveways dispersed throughout the residential area, approximately 1200 linear feet.
- E. Parcel B, between lots 1 and 50, a variable width landscaping strip, approximately 250 linear feet.
- F. Street parkway trees located within the public street within the Zone 6 boundary.
- G. Public park land area of 0.748 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 6 consists of an 80-lot residential development located in the southeastern portion of the City.

Zone 6 includes 80 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 6 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 6 shall be filed with the City and will be incorporated into this report by reference.

ZONE 7 – WOODLAKE MEADOWS

Zone 7 is comprised of Woodlake Meadows; the facilities within Zone 7 that will be operated, serviced and maintained are generally described as follows:

- A. Public park land area of 0.0468 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per one thousand persons served.

Zone 7 consists of a 5-lot residential development located in the northwestern portion of the City.

Zone 7 includes 5 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 7 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 7 shall be filed with the City and will be incorporated into this report by reference.

ZONE 8 – VINTAGE OAKS

Zone 8 is comprised of the Vintage Oaks Subdivision and the adjacent parcel to the north (APN 058-230-05); the facilities within Zone 8 that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping strip, including a 4-foot wide sidewalk, extending north and south of the future Vintage Oaks Court along the east side of S. Lower Sacramento Road for a total distance of approximately 252 linear feet.
- B. A 9.5' wide landscaping strip in the east half of the Lower Sacramento Road median, west of the Zone 8 boundary.
- C. Street parkway trees located within the public street (Vintage Oaks Court) within the Zone 8 boundary.
- D. Public park land area of 0.13005 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 8 consists of a 17-lot low-density residential development (Vintage Oaks) and a 2-lot low-density residential development (APN 058-230-05) bounded by DeBenedetti Park (APN 058-230-05) to the North, the Sunnyside Estates development to the South, Ellerth E. Larson Elementary School to the East and Lower Sacramento Road to the West.

Zone 8 includes 17 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 8 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 8 shall be filed with the City and will be incorporated into this report by reference.

ZONE 9 – INTERLAKE SQUARE

Zone 9 is comprised of the Interlake Square Subdivision; the facilities within Zone 9 that will be operated, serviced and maintained are generally described as follows:

- A. Street parkway trees located within the public rights-of-way of School Street and Park Street within the Zone 9 boundary.
- B. Public park land area of 0.08415 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 9 consists of an 11-lot low-density residential development (Interlake Square) located north of Park Street, generally south of Sierra Vista Place, east of South School Street and generally west of Sacramento Street.

Zone 9 includes 11 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 9 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 9 shall be filed with the City and will be incorporated into this report by reference.

ZONE 10 – LAKESHORE PROPERTIES

Zone 10 is comprised of the Lakeshore Properties subdivision; the facilities within Zone 10 that will be operated, serviced and maintained are generally described as follows:

- A. Public park land area of 0.05355 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per one thousand persons served.

Zone 10 consists of a 7-lot low-density residential development (Lakeshore Properties) located on the southwest corner of the Lakeshore Drive/Tienda Drive intersection within the City.

Zone 10 includes 7 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 10 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 10 shall be filed with the City and will be incorporated into this report by reference.

ZONE 11 – TATE PROPERTY

Zone 11 is comprised of the Tate Property development; the facilities within Zone 11 of the District that will be operated, serviced and maintained are generally described as follows:

- A. A masonry wall and 13.5' wide landscaping strip, divided by a 4-foot wide meandering sidewalk, along the north side of Harney Lane, immediately east of Legacy Way, approximately 140 linear feet.
- B. Street parkway trees located within the public street (Legacy Way) within the Zone 11 boundary.
- C. Public park land area of 0.05355 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 11 consists of a 1-lot low-density residential development located in the northeast corner of the Harney Lane/Legacy Way intersection within the City.

Zone 11 includes 7 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 11 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 11 shall be filed with the City and will be incorporated into this report by reference.

ZONE 12 – WINCHESTER WOODS

Zone 12 is comprised of the Winchester Woods subdivision; the facilities within Zone 12 that will be operated, serviced and maintained are generally described as follows:

- A. Public park land area of 0.0748 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per one thousand persons served.

Zone 12 consists of an 8-lot medium-density residential development located generally south of Wimbledon Drive, east of The Oaks apartment complex (APN 060-220-29) and west of Winchester Drive in the southeasterly portion of the City.

Zone 12 includes 8 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 12 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 12 shall be filed with the City and will be incorporated into this report by reference.

ZONE 13 – GUILD AVENUE INDUSTRIAL

Zone 13 is comprised of 8 industrial zoned parcels; the facilities within Zone 13 that will be operated, serviced and maintained are generally described as follows:

- A. A traffic signal at the intersection of Highway 12 (Victor Road) and Guild Avenue.
- B. A 15.0 foot irrigated, landscaped strip in a 16.0 foot median in Victor Road (Highway 12) south of the Zone 13 boundary, extending west from the current City limits for a distance of 700 feet.
- C. A 28.5 foot irrigated landscape strip on the north side of Victor Road (Highway 12), extending westerly from the current City limits to 231 feet west of the Guild Avenue intersection centerline and having a total length of 1,485 feet.
- D. Street sweeping along the north and south side of Victor Road (Highway 12) and along the median and curbing from 231 feet west of the Guild Avenue intersection centerline to the current City limits.

Zone 13 consists of 8 industrial parcels located on Guild Avenue, north of Lockeford Street. The benefit from facilities within Zone 13 for each lot has been determined based on an acreage basis.

Zone 13 includes 93.104 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 13 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 13 shall be filed with the City and will be incorporated into this report by reference.

ZONE 14 – LUCA PLACE

Zone 14 is comprised of the Luca Place subdivision; the facilities within Zone 14 that will be operated, serviced, maintained and improved are generally described as follows:

- A. A 6.5-foot irrigated landscape strip in the east half of the Westgate Drive median, west of the Zone 14 boundary.
- B. Street parkway trees located within the public street (Westgate Drive), within the Zone 14 boundary.
- C. Public park land area of 0.15895 acres in size equivalent to the current level of service standard for park area within the City of 3.4 acres per thousand persons served.

Zone 14 consists of a 17-lot, medium-density, residential development (Luca Place) bounded by Vintner's Square shopping center to the north, east and south and Westgate Drive to the west. Each lot benefits equally from the facilities within Zone 14.

When subdivided, Zone 14 will include 17 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 14 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 14 shall be filed with the City and will be incorporated into this report by reference.

ZONE 15 – GUILD AVENUE INDUSTRIAL

Zone 15 is comprised of 4 industrial zoned parcels; the facilities within Zone 15 that will be operated, serviced, maintained and improved are generally described as follows:

- A. A traffic signal at the intersection of Highway 12 (Victor Road) and Guild Avenue.
- B. A 15.0 foot irrigated, landscaped strip in a 16.0 foot median in Victor Road (Highway 12) south of the Zone 15 boundary, extending west from the current City limits for a distance of 700 feet.
- C. A 28.5 foot irrigated landscape strip on the north side of Victor Road (Highway 12), extending westerly from the current City limits to 231 feet west of the Guild Avenue intersection centerline and having a total length of 1,485 feet.
- D. Street sweeping along the north and south side of Victor Road (Highway 12) and along the median and curbing from 231 feet west of the Guild Avenue intersection centerline to the current City limits.

Zone 15 consists of 4 industrial zoned parcels, 3 located on Guild Avenue, north of Lockeford Street and 1 located on Victor Road, east of Guild Avenue. The benefit from facilities within Zone 15 for each lot has been determined based on an acreage basis.

Zone 15 includes 36.268 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 15 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 15 shall be filed with the City and will be incorporated into this report by reference.

ZONE 16 – WEST KETTLEMAN LANE COMMERCIAL

Zone 16 is comprised of 2 commercial office parcels; the facilities within Zone 16 that will be operated, serviced, maintained and improved are generally described as follows:

- A. A variable width (15 to 18 feet) irrigated, landscaped strip in the segmented median in W. Kettleman Lane (Highway 12) extending west from Ham Lane to Westgate Drive and having a total landscaped area of 36,505 square feet.
- B. A variable width (12 to 20 feet) irrigated landscape strip in the segmented median in Lower Sacramento Road extending south from the north boundary of parcel APN 027-410-06 (2429 W. Kettleman Lane) to the south boundary of APN 058-030-13 (1551 S. Lower Sacramento Road) and having a total landscaped area of 13,490 square feet.

Zone 16 consists of 2 commercial office parcels located on W. Kettleman Lane, west of Lakeshore Drive and east of Mills Avenue. The benefit from facilities within Zone 16 for each lot has been determined based on an acreage and land use basis.

Zone 16 includes 8.37 Dwelling Unit Equivalents.

In compliance with Proposition 218, an Assessment Ballot procedure for Zone 16 was held and ballots were tabulated at a public hearing where the property owners approved the new assessment. As this project is developed, plans and specifications for the amenity improvements to be maintained by the funds generated by Zone 16 shall be filed with the City and will be incorporated into this report by reference.

4. METHOD OF APPORTIONMENT

Pursuant to the Act, the net amounts to be assessed are apportioned by a formula or method that fairly distributes the net amount to be assessed among all parcels in proportion to benefits received from the improvements. The provisions of Article XIII C and XIII D of the California Constitution (Proposition 218) require the agency to separate the general benefit from special benefit, whereas only special benefits may be assessed.

IMPROVEMENT BENEFIT FINDINGS

The assessments outlined in Section 5 of this report are proposed to cover the estimated costs of providing all necessary service, operation, administration, and maintenance for each zone within the District. It has been determined that each assessable parcel within the District receives proportional special benefits from the improvements. The improvements were constructed and installed for the benefit of the parcels within the District in connection with their development; each parcel's relatively similar proximity to the improvements necessitates similar proportionate benefit allocation. Each parcel that receives special benefit from the improvements is assessed.

SPECIAL BENEFITS

The method of apportionment is based on the premise that each of the assessed parcels within the District receives special benefit from the improvements maintained and financed by District assessments. Specifically, the assessments associated with each zone are outlined in Section 5 of this report.

DESCRIPTION OF THE METHOD OF APPORTIONMENT

The District provides operation, service, and maintenance to all the specific local improvements and associated appurtenances located within the public right-of-ways in each of the various zones throughout the District. The annual assessments are based on the historical and estimated cost to operate, to service and to maintain the improvements that provide a special benefit to parcels within the District. The various improvements within each zone are identified and budgeted separately, including all expenditures, deficits, surpluses, revenues and reserves.

The assessments outlined in this section represent the proportionate special benefit to each property within the District and the basis of calculating each parcel's proportionate share of the annual costs associated with the improvements. The costs associated with the maintenance and operation of special benefit improvements shall be collected through annual assessments from each parcel receiving such benefit. The funds collected shall be dispersed and used for only the services and operation provided to the District.

The basis of determining each parcel's special benefit utilizes a weighting formula commonly known as a Dwelling Unit Equivalent (DUE). The developed single-family residential parcel is used as the base-unit for the calculation of assessments and is defined as 1.00 DUE. All other property types are assigned a DUE that reflects their proportional special benefit from the improvements as compared to the single-family residential parcel (weighted comparison).

To determine the DUE for multi-family residential (3 or more units), industrial, commercial or office parcels, a Benefit Unit Factor (BUF) is assigned to each property type. The assigned BUF multiplied by the parcel's specific acreage determines the DUE.

The following table provides a listing of the various land use types and the corresponding BUF used to calculate a parcel's DUE and proportionate benefit:

PROPERTY TYPE	BENEFIT UNIT FACTOR
Single Family Residential	1.00 per Property
Multi-Family Residential (Duplex)	2.00 per Property
Multi-Family Residential (3 or more units)	5.00 per Acre
Commercial or Office	
For the First 7.5 Acres	5.00 per Acre
For the Next 7.5 Acres	2.50 per Acre
For All Acreage Over 15.0 Acres	1.25 per Acre
Industrial	4.00 per Acre
Exempt	Not Applicable
Other	Case-by-Case

Exempt – Certain parcels, because of use, size, shape, or state of development, may be assigned a zero DUE, which will consequently result in a zero assessment for those parcels for that fiscal year. All parcels having such a zero DUE for the previous fiscal year shall annually be reconsidered to determine if the reason for assigning the zero DUE is still valid for the next fiscal year. Parcels which may be expected to have a zero DUE assigned are typically parcels which are all, or nearly all, publicly landscaped, parcels in public ownership, parcels owned by a public utility company and/or used for public utilities, public parks, public schools, and remainder parcels too small or narrow for reasonable residential or commercial use, unless actually in use.

Area Adjustments – Parcels which have an assessment determined by area and which have a portion of the parcel occupied by public or public utility uses separate from the entitled use and located in easements, prior to the multiplication by the DUE, shall have the area of the parcel adjusted to a usable area to reflect the loss or partial loss of the entitled use in those areas. This reduction shall not apply for normal peripheral and interior lot line public utility easements generally existing over the whole subdivision.

As previously noted, the District is comprised of several distinct zones. These zones encompass specific developments where the parcels receive a direct and special benefit from the operation, service, and maintenance of the related improvements. The basis of benefit and proportionate assessment for all parcels within the District is established by each parcel's calculated DUE and their proportionate share of the improvement costs based on their proportionate DUE within the zone. The method used to calculate the assessment for each zone is as follows:

$$\text{Total Estimated Costs} / \text{Total DUE (Zone)} = \text{Assessment per DUE}$$

$$\text{Assessment per DUE} \times \text{Total DUE per Parcel} = \text{Assessment per Parcel}$$

ASSESSMENT RANGE FORMULA

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218, legislative changes in the Article XIID of the Constitution of the State of California defined the definition of “new or increased assessment” to exclude certain conditions. These conditions included “any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed.” This definition and conditions were later confirmed through SB919 (Proposition 218 implementing legislation).

The purpose of establishing an assessment range formula is to provide for reasonable increases and inflationary adjustments to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District’s proposed assessment for Fiscal Year 2003/04, Fiscal Year 2004/05, Fiscal Year 2005/06, Fiscal Year 2007/08 and Fiscal Year 2008/09 balloting of property owners was required, pursuant to Proposition 218. The property owner ballots included an assessment to be approved, as well as the approval of an assessment range formula. Property owners within the District approved the proposed assessment and the assessment range formula.

The assessment range formula shall be applied to all future assessments within the District. Generally, if the proposed annual assessment for the current fiscal year is less than or equal to the maximum assessment (or adjusted maximum assessment), then the proposed annual assessment is not considered an increased assessment. The maximum assessment is equal to the initial Assessment approved by property owners adjusted annually by the following criteria:

1. Beginning in the second fiscal year, and each fiscal year thereafter, the maximum assessment will be recalculated annually.
2. The new adjusted maximum assessment for the year represents the prior year’s maximum assessment adjusted by the greater of:
 - (a) 5%, or
 - (b) The annual increase in the CPI.

Each year the annual increase in the CPI shall be computed. For Fiscal Year 2012/13, the increase in CPI is the percentage difference between the CPI of December 2011 and the CPI for the previous December, as provided and established by the Bureau of Labor Statistics (FY 2012/13 CPI increase is 2.93%). This percentage difference shall then establish the allowed increase based on CPI. The index used shall be all urban consumers for the San Francisco-Oakland-San Jose area. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the Council for determining fluctuations in the cost of living.

If CPI is less than 5%, then the allowable adjustment to the maximum assessment is 5%. If CPI is greater than 5%, then the allowable adjustment to the maximum assessment is based on CPI. The maximum assessment is adjusted annually and is calculated independent of the District’s annual budget and proposed annual assessment. Any proposed annual assessment (rate per DUE) less than or equal to this maximum assessment is not considered an increased assessment, even if the proposed assessment is greater than the assessment applied in the prior fiscal year.

The following table illustrates how the assessment range formula shall be applied:

Example	CPI % Increase	5.00% Increase	Max % Increase Without Re-Balloting	Prior Year Max Rate Per DUE	Increase Per DUE	New Max Rate Per DUE
1	5.25%	5.00%	5.25%	\$403.00	\$21.16	\$424.16
2	3.44%	5.00%	5.00%	\$403.00	\$20.15	\$423.15

For example, if the percentage change in CPI is greater than 5%, as in Example 1, then the percentage adjustment to the maximum assessment will be by CPI. If the percentage change in CPI is less than 5%, as in Example 2, then the percentage adjustment to the maximum assessment will be 5%.

As previously illustrated, the maximum assessment will be recalculated and adjusted annually. However, the Council may reduce or freeze the maximum assessment at any time by amending the annual engineer's report.

Although the maximum assessment will normally increase each year, the actual District assessments may remain virtually unchanged. The maximum assessment adjustment is designed to establish a reasonable limit on District assessments. The maximum assessment calculated each year does not require or facilitate an increase to the annual assessment and neither does it restrict assessments to the adjustment maximum amount. If the budget and assessments for the fiscal year do not require an increase, or the increase is less than the adjusted maximum assessment, then the required budget and assessment may be applied without additional property owner balloting. If the budget and assessments calculated requires an increase greater than the adjusted maximum assessment then the assessment is considered an increased assessment. In order to impose an increased assessment, the Council must comply with the provisions of Proposition 218 (Article XIID Section 4c of the California Constitution). Proposition 218 requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners, through the balloting process, must approve the proposed assessment increase. If the proposed assessment is approved, then a new maximum assessment is established for the District. If the proposed assessment is not approved, the Council may not levy an assessment greater than the adjusted maximum assessment previously established for the District.

5. ESTIMATE OF COSTS

5.1 Definitions

Definitions of maintenance items, words and phrases are shown below:

Fiscal Year – One year period of time beginning July 1 of a given year and ending June 30 of the following year.

Landscape Maintenance Labor – The estimated labor costs of maintaining and servicing the trees, shrubs, turf and ground cover areas within the District.

Maintenance Materials & Supplies – The estimated cost of materials necessary for maintaining, cleaning and servicing the landscaped areas and parklands within the District.

Irrigation Water – The cost of water used for irrigating the landscaping improvements of the District.

Utilities – The cost of electricity used for irrigation within the District.

Equipment Maintenance & Operation – The cost of materials and labor necessary for maintaining, repairing, and operating equipment (includes vehicles, benches, playground equipment, graffiti and litter removal, etc.) used for all aspects of maintenance in the District.

Maintenance Personnel – The estimated cost for personnel to perform maintenance duties within the District.

Contract Maintenance – The estimated cost of performing contracted maintenance within the District.

Consultant – Costs associated with outside consultant fees in order to comply with Assessment Law and placement of assessment onto the San Joaquin County Tax Roll each year.

County Administration – Costs of the County of San Joaquin related to the placement of assessments on the tax roll each year.

Insurance – The estimated costs to provide insurance for District personnel and staff.

Contingencies – An amount of 50% of the maintenance costs may be included to build a Reserve and Contingency Fund. The Act allows the assessments to "...include a reserve which shall not exceed the estimated costs of maintenance and servicing to December 10th of the fiscal year, or whenever the city expects to receive its apportionment of special assessments and tax collections from the county, whichever is later."

Total Dwelling Unit Equivalents – Dwelling Unit Equivalent (DUE) is a numeric value calculated for each parcel based on the parcel's land use. The DUE shown in the District/Zone budget represents the sum total of all parcels' DUE that receive benefit from the improvements. Refer to Section 4 for a more complete description of DUE.

Assessment per DUE – This amount represents the rate being applied to each parcel's individual DUE. The Assessment per Dwelling Unit Equivalent is the result of dividing the total Balance to Levy, by the sum of the District DUEs, for the Fiscal Year. This amount is always rounded down to the nearest even penny for tax bill purposes.

5.2 Zone-Specific Budgets and Reserve Information

ZONE 1 – ALMONDWOOD ESTATES

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$5,514.90
Masonry Block Walls	500.00
Street Trees	1,314.59
Park Maintenance	6,430.43
Total Operation Costs	\$13,759.92
Administration Costs	
Consultant	\$2,166.26
Publication	141.39
City Administration Fee	1,325.83
County Administration Fee	194.95
Total Administration Costs	\$3,828.43
Total Estimated Costs	\$17,588.35
Contribution to Reserves	0.00
Rounding Adjustment	(0.03)
Total Assessment	\$17,588.32
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$44,060.68</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$3,600.00
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$3,600.00
Wall Reserve – June 30, 2012	\$16,500.00
Contribution to Wall Reserve	0.00
Estimated Wall Reserve – June 30, 2013	\$16,500.00
Total Estimated Reserve – June 30, 2013	\$20,100.00

ZONE 2 – CENTURY MEADOWS ONE, UNIT 2 & 3

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$5,666.39
Masonry Block Walls	500.00
Street Trees	3,422.47
Park Maintenance	11,557.40
Total Operation Costs	\$21,146.26
Administration Costs	
Consultant	\$3,329.11
Publication	254.12
City Administration Fee	2,037.54
County Administration Fee	292.52
Total Administration Costs	\$5,913.29
Total Estimated Costs	\$27,059.55
Contribution to Reserves	0.00
Rounding Adjustment	0.63
Total Assessment	\$27,060.18
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$59,932.98</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$3,500.00
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$3,500.00
Wall Reserve – June 30, 2012	\$20,000.00
Contribution to Wall Reserve	0.00
Estimated Wall Reserve – June 30, 2013	\$20,000.00
Total Estimated Reserve – June 30, 2013	\$23,500.00

ZONE 3 – MILLSBRIDGE II

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$460.30
Street Trees	713.96
Park Maintenance	<u>3,389.01</u>
Total Operation Costs	\$4,563.27
Administration Costs	
Consultant	\$718.41
Publication	74.52
City Administration Fee	439.69
County Administration Fee	62.05
Teeter Buy Out	<u>610.50</u>
Total Administration Costs	\$1,905.17
Total Estimated Costs	\$6,468.44
Contribution to Reserves	500.00
Rounding Adjustment	<u>0.08</u>
Total Assessment	\$6,968.52
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$18,134.29</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$3,000.00
Contribution to Landscape Reserve	<u>500.00</u>
Estimated Landscape Reserve – June 30, 2013	\$3,500.00
Total Estimated Reserve – June 30, 2013	\$3,500.00

ZONE 4 – ALMOND NORTH

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$1,308.25
Street Trees	475.97
Park Maintenance	<u>2,954.52</u>
Total Operation Costs	\$4,738.74
Administration Costs	
Consultant	\$746.03
Publication	64.96
City Administration Fee	456.60
County Administration Fee	64.34
Teeter Buy Out	<u>172.50</u>
Total Administration Costs	\$1,504.43
Total Estimated Costs	\$6,243.17
Contribution to Reserves	500.00
Rounding Adjustment	<u>(0.17)</u>
Total Assessment	\$6,743.00
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$16,225.42</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$2,500.00
Contribution to Landscape Reserve	<u>500.00</u>
Estimated Landscape Reserve – June 30, 2013	\$3,000.00
Total Estimated Reserve – June 30, 2013	\$3,000.00

ZONE 5 – LEGACY ESTATES I & II AND KIRST ESTATES

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$9,235.79
Masonry Block Walls	500.00
Street Trees	4,555.73
Park Maintenance	<u>19,378.19</u>
Total Operation Costs	\$33,669.71
Administration Costs	
Consultant	\$5,300.72
Publication	426.08
City Administration Fee	3,244.23
County Administration Fee	430.88
	<u>2,265.50</u>
Total Administration Costs	\$11,667.41
Total Estimated Costs	\$45,337.12
Contribution to Reserves	1,000.00
Rounding Adjustment	<u>(2.18)</u>
Total Assessment	\$46,334.94
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$75,778.69</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$4,200.00
Contribution to Landscape Reserve	<u>500.00</u>
Estimated Landscape Reserve – June 30, 2013	\$4,700.00
Wall Reserve – June 30, 2012	\$8,000.00
Contribution to Wall Reserve	<u>500.00</u>
Estimated Wall Reserve – June 30, 2013	\$8,500.00
Total Estimated Reserve – June 30, 2013	\$13,200.00

ZONE 6 – THE VILLAS

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$6,643.04
Masonry Block Walls	800.00
Street Trees	906.61
Park Maintenance	<u>6,951.82</u>
Total Operation Costs	\$15,301.47
Administration Costs	
Consultant	\$2,408.95
Publication	152.85
City Administration Fee	1,474.37
County Administration Fee	<u>226.08</u>
Total Administration Costs	\$4,262.25
Total Estimated Costs	\$19,563.72
Contribution to Reserves	0.00
Rounding Adjustment	<u>(0.52)</u>
Total Assessment	\$19,563.20
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$61,934.93</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$5,800.00
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$5,800.00
Wall Reserve – June 30, 2012	\$18,100.00
Contribution to Wall Reserve	<u>0.00</u>
Estimated Wall Reserve – June 30, 2013	\$18,100.00
Total Estimated Reserve – June 30, 2013	\$23,900.00

ZONE 7 – WOODLAKE MEADOWS

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$43.45
Park Maintenance	434.49
Total Operation Costs	\$ 477.94
Administration Costs	
Consultant	\$75.24
Publication	9.55
City Administration Fee	46.05
County Administration Fee	5.98
Teeter Buy Out	56.25
Total Administration Costs	\$ 193.07
Total Estimated Costs	\$ 671.01
Contribution to Reserves	0.00
Rounding Adjustment	(0.01)
Total Assessment	\$671.00
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$1,278.00</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$0.00
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$0.00
Total Estimated Reserve – June 30, 2013	\$0.00

ZONE 8 – VINTAGE OAKS

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$2,949.39
Masonry Block Walls	300.00
Street Trees	260.65
Park Maintenance	1,477.26
Total Operation Costs	\$4,987.30
Administration Costs	
Consultant	\$785.17
Publication	32.48
City Administration Fee	480.55
County Administration Fee	51.00
Total Administration Costs	\$1,349.20
Total Estimated Costs	\$6,336.50
Contribution to Reserves	0.00
Rounding Adjustment	0.08
Total Assessment	\$6,336.58
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$9,493.24</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$2,456.89
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$2,456.89
Wall Reserve – June 30, 2012	\$2,135.00
Contribution to Wall Reserve	0.00
Estimated Wall Reserve – June 30, 2013	\$2,135.00
Total Estimated Reserve – June 30, 2013	\$4,591.89

ZONE 9 – INTERLAKE SQUARE

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$108.05
Street Trees	124.66
Park Maintenance	<u>955.88</u>
Total Operation Costs	\$1,188.59
Administration Costs	
Consultant	\$187.12
Publication	21.02
City Administration Fee	114.53
County Administration Fee	14.80
Teeter Buy Out	<u>482.75</u>
Total Administration Costs	\$820.22
Total Estimated Costs	\$2,008.81
Contribution to Reserves	0.00
Rounding Adjustment	<u>0.01</u>
Total Assessment	\$2,008.82
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$2,924.09</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$0.00
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$0.00
Total Estimated Reserve – June 30, 2013	\$0.00

ZONE 10 – LAKESHORE PROPERTIES

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$60.83
Park Maintenance	608.28
Total Operation Costs	\$669.11
Administration Costs	
Consultant	\$105.34
Publication	13.37
City Administration Fee	64.47
County Administration Fee	8.35
Teeter Buy Out	45.75
Total Administration Costs	\$237.28
Total Estimated Costs	\$906.39
Contribution to Reserves	0.00
Rounding Adjustment	(0.03)
Total Assessment	\$906.36
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$1,562.55</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$0.00
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$0.00
Total Estimated Reserve – June 30, 2013	\$0.00

ZONE 11 – TATE PROPERTY

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$374.77
Masonry Block Walls	100.00
Street Trees	56.66
Park Maintenance	<u>608.28</u>
Total Operation Costs	\$1,139.71
Administration Costs	
Consultant	\$179.43
Publication	13.37
City Administration Fee	109.82
County Administration Fee	<u>3.00</u>
Total Administration Costs	\$305.62
Total Estimated Costs	\$1,445.33
Contribution to Reserves	0.00
Rounding Adjustment	<u>0.03</u>
Total Assessment	\$1,445.36
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$2,322.39</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$39.00
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$39.00
Wall Reserve – June 30, 2012	\$98.00
Contribution to Wall Reserve	<u>0.00</u>
Estimated Wall Reserve – June 30, 2013	\$98.00
Total Estimated Reserve – June 30, 2013	\$137.00

ZONE 12 – WINCHESTER WOODS

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$84.97
Park Maintenance	<u>849.67</u>
Total Operation Costs	\$934.64
Administration Costs	
Consultant	\$147.14
Publication	15.29
City Administration Fee	90.06
County Administration Fee	11.61
Teeter Buy Out	<u>369.17</u>
Total Administration Costs	\$633.27
Total Estimated Costs	\$1,567.91
Contribution to Reserves	0.00
Rounding Adjustment	<u>(0.08)</u>
Total Assessment	\$1,567.84
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$1,567.91</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$0.00
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$0.00
Total Estimated Reserve – June 30, 2013	\$0.00

ZONE 13 – GUILD AVENUE INDUSTRIAL

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$408.95
Street Sweeping	<u>17.98</u>
Total Operation Costs	\$426.93
Administration Costs	
Consultant	\$67.21
Publication	177.89
City Administration Fee	41.14
County Administration Fee	<u>7.75</u>
Total Administration Costs	\$293.99
Total Estimated Costs	\$720.92
Contribution to Reserves	0.00
Rounding Adjustment	<u>(0.32)</u>
Total Assessment	\$720.60
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$11,622.89</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$248.00
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$248.00
Total Estimated Reserve – June 30, 2013	\$248.00

ZONE 14 – LUCA PLACE

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$306.90
Total Operation Costs	\$306.90
Administration Costs	
Consultant	\$48.32
Publication	32.48
City Administration Fee	29.57
County Administration Fee	3.00
Total Administration Costs	\$113.37
Total Estimated Costs	\$420.27
Contribution to Reserves	0.00
Rounding Adjustment	(0.03)
Total Assessment	\$420.24
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$6,073.88</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$2,000.00
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$2,000.00
Total Estimated Reserve – June 30, 2013	\$2,000.00

ZONE 15 – GUILD AVENUE INDUSTRIAL

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$394.90
Street Sweeping	<u>7.00</u>
Total Operation Costs	\$401.90
Administration Costs	
Consultant	\$63.27
Publication	69.30
City Administration Fee	38.73
County Administration Fee	<u>5.99</u>
Total Administration Costs	\$177.29
Total Estimated Costs	\$579.19
Contribution to Reserves	0.00
Rounding Adjustment	<u>(0.01)</u>
Total Assessment	\$579.18
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$4,520.56</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$75.84
Contribution to Landscape Reserve	<u>0.00</u>
Estimated Landscape Reserve – June 30, 2013	\$75.84
Total Estimated Reserve – June 30, 2013	\$75.84

ZONE 16 – WEST KETTLEMAN LANE COMMERCIAL

Fiscal Year 2012/13 Budget

DESCRIPTION	AMOUNT
Operation Costs	
Landscape	\$70.88
Total Operation Costs	\$70.88
Administration Costs	
Consultant	\$11.16
Publication	15.99
City Administration Fee	6.83
County Administration Fee	1.13
Total Administration Costs	\$35.11
Total Estimated Costs	\$105.99
Contribution to Reserves	0.00
Rounding Adjustment	(0.03)
Total Assessment	\$105.96
<i>Fiscal Year 2012/13 Maximum Assessment</i>	<i>\$378.65</i>

Capital Project Reserve Information

DESCRIPTION	AMOUNT
Landscape Reserve – June 30, 2012	\$24.57
Contribution to Landscape Reserve	0.00
Estimated Landscape Reserve – June 30, 2013	\$24.57
Total Estimated Reserve – June 30, 2013	\$24.57

6. *ASSESSMENT DIAGRAMS*

Assessment Diagrams have been submitted to the City Clerk in the format required under the provisions of the Act and are made part of this report.

7. FISCAL YEAR 2012/13 ASSESSMENT ROLL

The assessment roll for each zone is shown on the following pages. The description of each lot or parcel as part of the records of the County Assessor of the County of San Joaquin are, by reference, made part of this Report.

RESOLUTION NO. 2012-64

A RESOLUTION OF THE LODI CITY COUNCIL
INITIATING PROCEEDINGS FOR THE LEVY AND
COLLECTION OF ASSESSMENTS FOR THE LODI
CONSOLIDATED LANDSCAPE MAINTENANCE
ASSESSMENT DISTRICT NO. 2003-1 FOR
FISCAL YEAR 2012/13

=====

WHEREAS, the City Council previously completed its proceedings in accordance with and pursuant to the Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (*commencing* with Section 22500) ("Act") to establish the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 ("Assessment District"); and

WHEREAS, the City of Lodi has retained NBS for the purpose of assisting with the annual levy of the Assessment District and to prepare and file an Annual Report in accordance with §22567 of the Act.

NOW, THEREFORE, BE IT RESOLVED, DETERMINED, AND ORDERED BY THE CITY COUNCIL, AS FOLLOW:

1. Annual Report: The City Council hereby orders NBS to prepare and file with the City Clerk the Annual Report concerning the levy and collection of assessments within the Assessment District for the fiscal year commencing July 1, 2012 and ending June 30, 2013.
2. New Improvements or Changes to Existing Improvements: There are no changes to existing improvements nor are there any items being added to the list of improvements previously approved at the formation of the Assessment District.

Dated: May 16, 2012

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I hereby certify that Resolution No. 2012-64 was passed and adopted by the City Council of the City of Lodi in a regular meeting held May 16, 2012, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, Katzakian, Nakanishi,
and Mayor Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – None

ABSTAIN: COUNCIL MEMBERS – None


RANDI JOHL
City Clerk

RESOLUTION NO. 2012-65

A RESOLUTION OF THE LODI CITY COUNCIL
APPROVING THE ANNUAL REPORT FOR THE
LODI CONSOLIDATED LANDSCAPE MAINTENANCE
ASSESSMENT DISTRICT NO. 2003-1 FOR
FISCAL YEAR 2012/13

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WHEREAS, the City Council previously completed its proceedings in accordance with and pursuant to the *Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500)* ("Act") to establish the *Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1* ("Assessment District"); and

WHEREAS, the City of Lodi has retained NBS for the purpose of assisting with the annual levy of the Assessment District and to prepare and file an Annual Report in accordance with §22567 of the Act; and

WHEREAS, the City Council has, by previous resolution, ordered NBS to prepare and file such Annual Report; and

WHEREAS, NBS has prepared and filed such Annual Report with the City Clerk.

NOW, THEREFORE, BE IT RESOLVED, DETERMINED, AND ORDERED BY THE CITY COUNCIL, AS FOLLOW:

1. Approval of Report: The City Council hereby approves the Annual Report concerning the levy of assessments as submitted by NBS for the fiscal year commencing July 1, 2012 and ending June 30, 2013.

Dated: May 16, 2012

=====

I hereby certify that Resolution No. 2012-65 was passed and adopted by the City Council of the City of Lodi in a regular meeting held May 16, 2012, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, Katzakian, Nakanishi,
and Mayor Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – None

ABSTAIN: COUNCIL MEMBERS – None


RANDI JOHL
City Clerk

RESOLUTION NO. 2012-66

A RESOLUTION OF THE LODI CITY COUNCIL
DECLARING ITS INTENTION TO LEVY AND COLLECT
ASSESSMENTS FOR THE LODI CONSOLIDATED
LANDSCAPE MAINTENANCE ASSESSMENT
DISTRICT NO. 2003-1 FOR FISCAL YEAR 2012/13

WHEREAS, the City Council previously completed its proceedings in accordance with and pursuant to the *Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500)* ("Act") to establish the *Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1* ("Assessment District"); and

WHEREAS, the City of Lodi has retained NBS for the purpose of assisting with the annual levy of the Assessment District and to prepare and file an Annual Report in accordance with §22567 of the Act.

NOW, THEREFORE, BE IT RESOLVED, DETERMINED, AND ORDERED BY THE CITY COUNCIL, AS FOLLOW:

1. **Intention:** The City Council hereby declares its intention to levy and collect assessments within the Assessment District to pay the costs of the improvements for the fiscal year commencing July 1, 2012 and ending June 30, 2013. The City Council finds that the public's best interest requires such action.
2. **Improvements:** The improvements include, but are not limited to: turf, shrubs, plants and trees, landscaping, irrigation and drainage systems, graffiti removal, and associated appurtenances within the public right-of-ways or specific easements. Services provided include all necessary service, operations, administration, and maintenance required to keep the improvements in a healthy, vigorous, and satisfactory condition.
3. **Assessment District Boundaries:** The boundaries of the Assessment District are as shown by the assessment diagram filed in the offices of the City Clerk, which map is made a part hereof by reference.
4. **Annual Report:** Reference is made to the Annual Report prepared by NBS, on file with the City Clerk, for a full and detailed description of the improvements, the boundaries of the Assessment District and zones therein and the proposed assessments upon assessable lots and parcels of land within the Assessment District.
5. **Notice of Public Hearing:** The City Council hereby declares its intention to conduct a Public Hearing concerning the levy of assessments in accordance with 522629 of the Act. All objections to the assessment, if any, will be considered by the City Council. The Public Hearing will be held on **Wednesday, June 20, 2012, at 7:00 p.m.** or as soon thereafter as is feasible in the City Council Chambers located at 305 West Pine Street, Lodi, CA, 95240. The City Council further orders the City Clerk to publish notice of this resolution in accordance with 522626 of the Act.

6. Increase of Assessment: The maximum assessment is not proposed to increase from the previous year above that previously approved by the property owners (as "increased assessment" is defined in §54954.6 of the Government Code).

Dated: May 16, 2012

=====

I hereby certify that Resolution No. 2012-66 was passed and adopted by the City Council of the City of Lodi in a regular meeting held May 16, 2012, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, Katzakian, Nakanishi,
and Mayor Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – None

ABSTAIN: COUNCIL MEMBERS – None


RANDI JOHL
City Clerk

CITY COUNCIL

JOANNE L. MOUNCE, Mayor
ALAN NAKANISHI,
Mayor Pro Tempore
LARRY D. HANSEN
BOB JOHNSON
PHIL KATZAKIAN

CITY OF LODI
PUBLIC WORKS DEPARTMENT

CITY HALL, 221 WEST PINE STREET
P.O. BOX 3006
LODI, CALIFORNIA 95241-1910
(209) 333-6706
FAX (209) 333-6710
EMAIL pwdept@iodi.gov
<http://www.iodi.gov>

KONRADT BARTLAM
City Manager
RANDI JOHL
City Clerk
D. STEVEN SCHWABAUER
City Attorney
F. WALLY SANDELIN
Public Works Director

May 10, 2012

NBS
32605 Temecula Parkway, Ste. 100
Temecula, CA 92592

SUBJECT: Adopt Resolution Initiating Proceedings for the Levy and Collection of Assessments, Resolution Approving the Annual Report, and Resolution Declaring Intention to Levy and Collect Assessments for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for Fiscal Year 2012/13; Set Public Hearing for June 20, 2012

Enclosed is a copy of background information on an item on the City Council agenda of Wednesday, May 16, 2012. The meeting will be held at 7 p.m. in the City Council Chamber, Carnegie Forum, 305 West Pine Street.

This item is on the consent calendar and is usually not discussed unless a Council Member requests discussion. The public is given an opportunity to address items on the consent calendar at the appropriate time.

If you wish to write to the City Council, please address your letter to City Council, City of Lodi, P. O. Box 3006, Lodi, California, 95241-1910. Be sure to allow time for the mail. Or, you may hand-deliver the letter to City Hall, 221 West Pine Street.

If you wish to address the Council at the Council Meeting, be sure to fill out a speaker's card (available at the Carnegie Forum immediately prior to the start of the meeting) and give it to the City Clerk. If you have any questions about communicating with the Council, please contact Randi Johl, City Clerk, at (209) 333-6702.

If you have any questions about the item itself, please call Chris Boyer, Assistant Engineer, at (209) 333-6800, extension 3321.



for: F. Wally Sandelin
Public Works Director

FWS/pmf

Enclosure

cc: City Clerk



*Please immediately confirm receipt
of this fax by calling 333-6702*

CITY OF LODI
P. O. BOX 3006
LODI, CALIFORNIA 95241-1910

ADVERTISING INSTRUCTIONS

**SUBJECT: PUBLIC HEARING TO CONSIDER INTENTION TO LEVY AND
COLLECT ASSESSMENTS FOR THE LODI CONSOLIDATED
LANDSCAPE MAINTENANCE ASSESSMENT DISTRICT NO. 2003-
■ FOR FISCAL YEAR 2012/13**

PUBLISH DATE: SATURDAY, MAY 19, 2012

LEGAL AD

TEAR SHEETS WANTED: One (1) please

**SEND AFFIDAVIT AND BILL TO:
LNS ACCT. #0510052**

RANDI JOHL, CITY CLERK
City of Lodi
P.O. Box 3006
Lodi, CA 95241-1910

DATED: THURSDAY, MAY 17, 2012

**ORDERED BY: RANDI JOHL
CITY CLERK**


JENNIFER M. ROBISON, CMC
ASSISTANT CITY CLERK

MARIA BECERRA
ADMINISTRATIVE CLERK

Verify Appearance of this Legal in the Newspaper – Copy to File

Faxed to the Sentinel at 369-1084 at _____ (time) on _____ (date) _____ (pages)	
LNS _____	Phoned to confirm receipt of all pages at _____ (time) _____ CF _____ MB _____ JMR (initials)



DECLARATION OF POSTING

PUBLIC HEARING TO CONSIDER INTENTION TO LEVY AND COLLECT ASSESSMENTS FOR THE LODI CONSOLIDATED LANDSCAPE MAINTENANCE ASSESSMENT DISTRICT NO. 2003-1 FOR FISCAL YEAR 2012/13

On Thursday, May 17, 2012, in the City of Lodi, San Joaquin County, California, a Notice of Public Hearing to consider intention to levy and collect assessments for the Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1 for fiscal year 2012/13 (attached and marked as Exhibit A) was posted at the following locations:

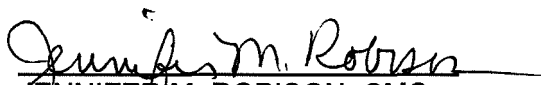
Lodi Public Library
Lodi City Clerk's Office
Lodi City Hall Lobby
Lodi Carnegie Forum

I declare under penalty of perjury that the foregoing is true and correct.

Executed on May 17, 2012, at Lodi, California.

ORDERED BY:

**RANDI JOHL
CITY CLERK**


JENNIFER M. ROBISON, CMC
ASSISTANT CITY CLERK

MARIA BECERRA
ADMINISTRATIVE CLERK

NOTICE OF PUBLIC HEARING

RESOLUTION NO. 2012-66

A RESOLUTION OF THE LODI CITY COUNCIL
DECLARING ITS INTENTION TO LEVY AND COLLECT
ASSESSMENTS FOR THE LODI CONSOLIDATED
LANDSCAPE MAINTENANCE ASSESSMENT
DISTRICT NO. 2003-1 FOR FISCAL YEAR 2012/13

=====

WHEREAS, the City Council previously completed its proceedings in accordance with and pursuant to the *Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500)* ("Act") to establish the *Lodi Consolidated Landscape Maintenance Assessment District No. 2003-1* ("Assessment District"); and

WHEREAS, the City of Lodi has retained NBS for the purpose of assisting with the annual levy of the Assessment District and to prepare and file an Annual Report in accordance with 322567 of the Act.

NOW, THEREFORE, BE IT RESOLVED, DETERMINED, AND ORDERED BY THE CITY COUNCIL, AS FOLLOW:

1. Intention: The City Council hereby declares its intention to levy and collect assessments within the Assessment District to pay the costs of the improvements for the fiscal year commencing July 1, 2012 and ending June 30, 2013. The City Council finds that the public's best interest requires such action.
2. Improvements: The improvements include, but are not limited to: turf, shrubs, plants and trees, landscaping, irrigation and drainage systems, graffiti removal, and associated appurtenances within the public right-of-ways or specific easements. Services provided include all necessary service, operations, administration, and maintenance required to keep the improvements in a healthy, vigorous, and satisfactory condition.
3. Assessment District Boundaries: The boundaries of the Assessment District are as shown by the assessment diagram filed in the offices of the City Clerk, which map is made a part hereof by reference.
4. Annual Report: Reference is made to the Annual Report prepared by NBS, on file with the City Clerk, for a full and detailed description of the improvements, the boundaries of the Assessment District and zones therein and the proposed assessments upon assessable lots and parcels of land within the Assessment District.
5. **Notice of Public Hearing:** The City Council hereby declares its intention to conduct a Public Hearing concerning the levy of assessments in accordance with 322629 of the Act. All objections to the assessment, if any, will be considered by the City Council. The Public Hearing will be held on **Wednesday, June 20, 2012, at 7:00 p.m.** or as soon thereafter as is feasible in the City Council Chambers located at 305 West Pine Street, Lodi, CA, 95240. The City Council further orders the City Clerk to publish notice of this resolution in accordance with 322626 of the Act.

6. Increase of Assessment: The maximum assessment is not proposed to increase from the previous year above that previously approved by the property owners (as "increased assessment" is defined in §54954.6 of the Government Code).

Dated: May 16, 2012


I hereby certify that Resolution No. 2012-66 was passed and adopted by the City Council of the City of Lodi in a regular meeting held May 16, 2012, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, Katzakian, Nakanishi,
and Mayor Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – None

ABSTAIN: COUNCIL MEMBERS – None



RANDI JOEL
City Clerk